



3K Report Tool Client, User Guide

Version 10.4

Date of version: September 17th 2010

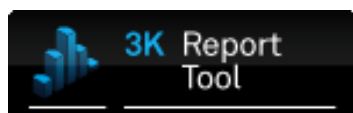


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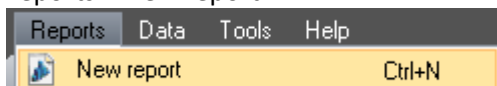
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Using reports

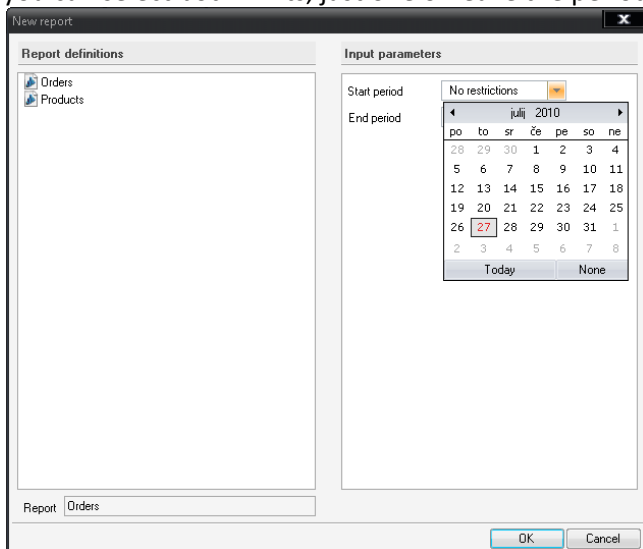
Creating a new report

Steps for creating a new report:

- 1 You can create a new report by clicking »New report« button  or by selecting a menu action Reports > New report.



- 2 In section »Report definitions« select a report you want to create. Depending on a report definition you get fields to enter start and end period in section »Input parameters«. For a period you can select both limits, just one or leave the period empty.

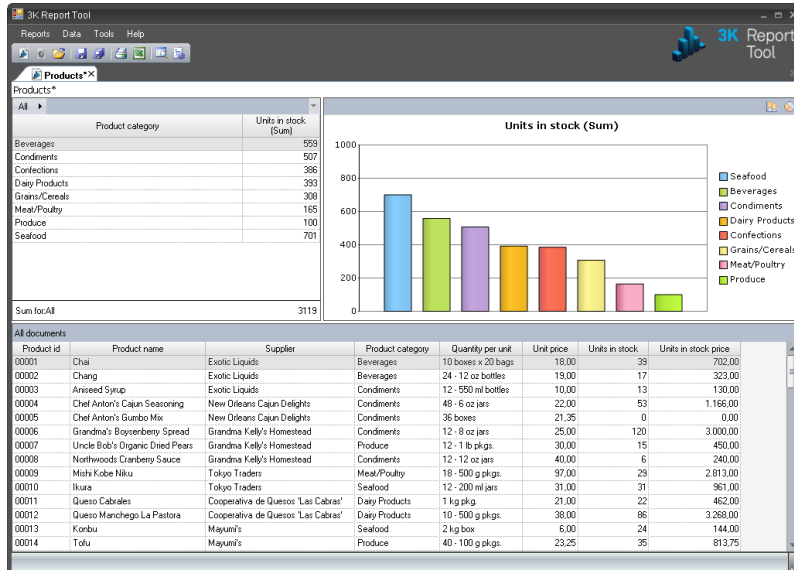


- 3 Create a report by selecting a »OK« button.

Description of a client window

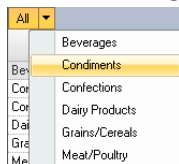
Client window is divided into 3 parts:

- Category grid. Left upper part.
- Category chart. Right upper part.
- Detail grid. Lower part.

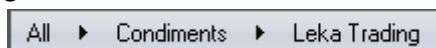


Category grid

Category grid contains two columns, column with category name and summary column. When opening a report you get a first level category in a category grid. You can navigate to a next level by double clicking the category value or by selecting an arrow next to the »All« button.

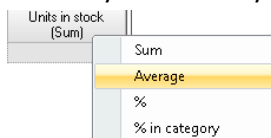


By selecting a category you are moved to a next category level. Navigation to all further levels is the same as far as levels are available. Currently selected value is displayed in a row above a category grid.



By selecting an arrow you can navigate back to desired level and category. By selecting »All« button you are returned back to the top of category tree.

Title of the summary column shows by which column the data is summed. Title inside brackets shows summary function. By clicking on summary column title you can change the summary function.



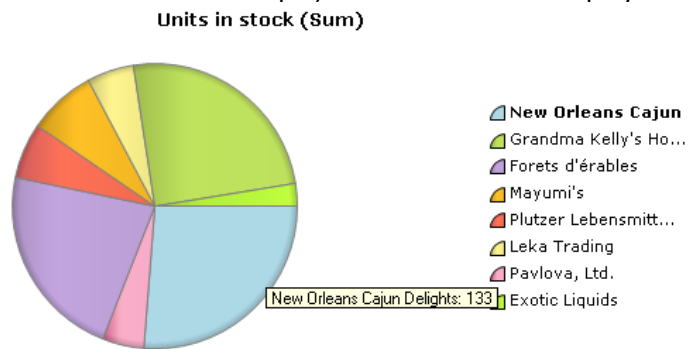
The change of the summary function changes the summary values.

Category chart

Category chart defines graphical representation of category grid. There are two different graphical representations: column and pie chart. You can change graph type by selecting a button above graph.



Summary values of a category are presented by column height or pie section. When you point a mouse over a column or a pie, a selected value is displayed bold in a graph legend.



By clicking a column or a pie you are navigated to a next level in a category tree. Click is equal to double click in a category grid.

Detail grid

Grid table displays values of all documents in a selected category. The change of selected category changes the documents in a category grid. Category grid column titles are equal to field names in a report definition. By clicking a column title data are sorted by column values.

Supplier
Exotic Liquids
Forets d'érables
Grandma Kelly's Homestead
Grandma Kelly's Homestead
Leka Trading

Double click on detail grid row opens a corresponding Notes document in a Notes client.

Product	
Data	
Product id	00008
Product name	Northwoods Cranberry Sauce
Supplier	00003 Grandma Kelly's Homestead
Product category	00002 Condiments
Quantity	12 - 12 oz jars
Unit price	40,00

You can move, delete and insert detail grid columns. To move a column click a column title and move it to a new position.

Product name	Product name
New Orleans Cajun Delights	Chef Anton's Cajun Seasoning

You can remove detail column by right click on column title and selecting Delete column option.

Product category	Quantity per unit	Unit
Condiments	Insert column	
Condiments	Delete column	

Deleted column can be inserted by right click on column title and selecting Insert column option.

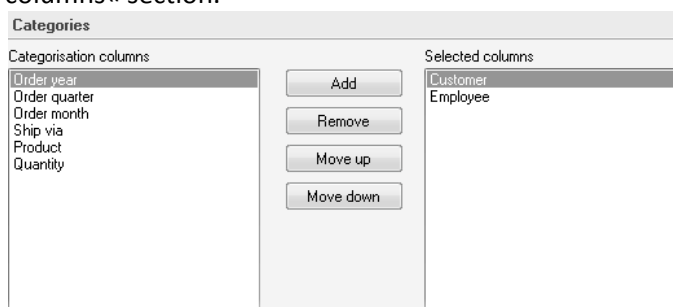
Product name	Unit price	Units in stock	Units in stock price
Chef Anton's Cajun Seasoning			
Chef Anton's Gumbo Mix			
Louisiana Fiery Hot Pepper			

Managing categories

When opening a report categories are displayed as defined on a report definition. You can change the categories and their order in a client by selecting »Settings« button  or by selecting menu Data > Settings.



Dialog button shows all available categories. In section »Selected columns« there are all currently selected categories. All available not selected categories are presented in a »Categorization columns« section.



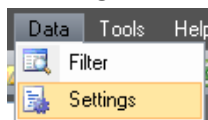
You can manage categories by selecting buttons between both sections.

Button	Description
Add	In a »Categorization columns« section select a category you want to add and click »Add« button. Selected category will appear in a »Selected columns« section.
Remove	In a »Selected columns« section select a category you want to remove and click »Remove« button. Selected category will appear in a »Categorization columns« section.
Move up	In a »Selected columns« section select a category you want to move higher in a category tree and click »Move up« button.
Move down	In a »Selected columns« section select a category you want to move lower in a category tree and click »Move down« button.

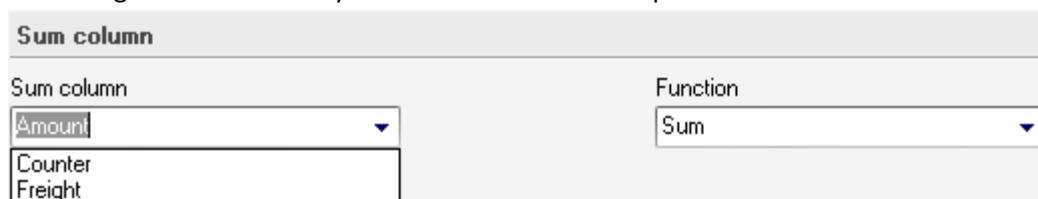
When you manage categories confirm changes by clicking »OK« button. Among selected columns there must be at least one category.

Managing summary column

When opening a report summary column and function are defined by report definition. You can change summary column and function by selecting »Settings« button  or by selecting menu Data > Settings.



In a dialog window summary column and function are presented in a »Sum column« section.

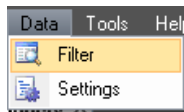


For a summary column you can select all available numeric fields. In function field the following options are available:

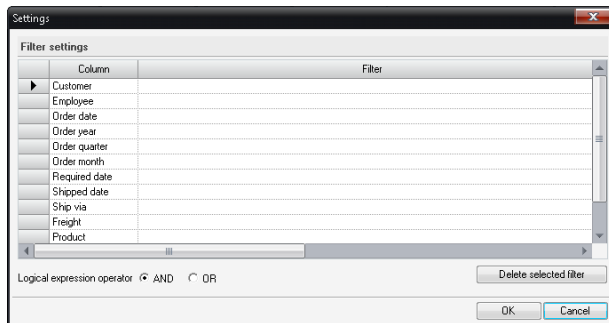
Function	Description
Sum	Category shows the sum of selected numeric field.
Average	Category shows the average of selected numeric field.
%	Category shows the percent of total sum.
% in category	Category shows the percentage of the value of the selected category.

Filtering data

Client provides functionality to additionally filter data found by initial search. You can add filter by selecting »Filter« button  or by selecting menu Data > Filter.



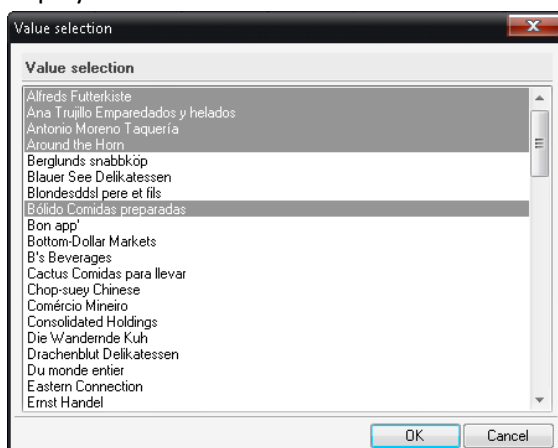
Dialog window shows all columns by which you can filter data.



You can select filter by clicking an arrow in a filter field.



Filter input depends on data type of the filter column. If filter is of string data type you get a window with all field values. You select the value with click on a value. If you want to select more values, press <CTRL> key and select values. Confirm selection by clicking »OK« button. Chosen values are displayed in a field.



If you set filter for date column, you get a window for date period input. By default period is set to minimum and maximum dates determined by column values. You can limit a period only to an upper value (less than) or to a lower value (greater than). Confirm selection by clicking »OK« button.

Value selection dialog box. Field: Order date. Operator: between. Restrictions: No restrictions. Value: 6.5.2010. Buttons: OK, Cancel.

If you set filter for numeric column, you get a window for numeric interval input. By default interval is set to minimum and maximum number determined by column values. You can limit an interval only to an upper value (less than) or to a lower value (greater than). Confirm selection by clicking »OK« button.

Value selection dialog box. Field: Quantity. Operator: between. Values: 1.00, 130.00. Buttons: OK, Cancel.

You can set filter for more than one field. Dependence between selected filter columns is determined by logical operator. You can get data which fit all selected filters (AND) or at least one selected filter (OR).

Logical expression operator: ☒ AND ☐ OR

You can delete filter by selecting a filter column and selecting »Delete selected filter«

Filter selection interface. Table: Product (00002 Chang; 00003 Aniseed Syrup; 00004 Chef Anton's Cajun Seasoning), Quantity. Logical expression operator: ☒ AND ☐ OR. Button: Delete selected filter.

Confirm selected filter by »OK« button. After filter is confirmed client shows only data which match the filter. Currently active filter is shown in a row above category chart. By clicking displayed filter you get dialog widow for filter input.

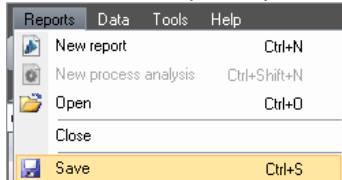
Filter: Customer=Alfreds Futterkiste; Ana Trujillo Empared...

Other options

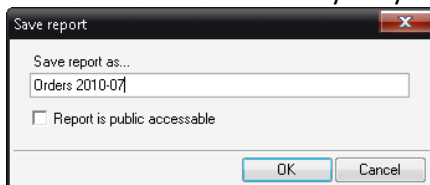
Saving and opening reports

You can save current report for further use. The point of saving a report is that you don't have to wait for data searching when creating a new report. Steps for saving a report:

- 1 You can save report by selecting »Save« button  or by menu Reports > Save.



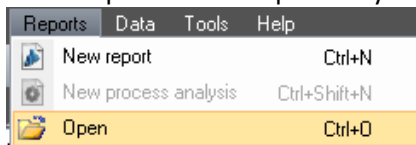
- 2 In a dialog you enter a name under which you want to save the report. Saved report can be available for all users or only for you.



- 3 You save the report by »OK« button.

Steps for opening a report

- 1 Saved reports can be opened by selecting »Open« button  or by menu Reports > Open.

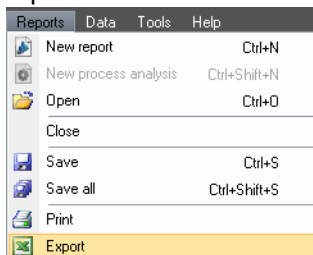


- 2 In a dialog window you get a list of all saved reports. Choose a report you want to open and confirm a choice by »OK« button.

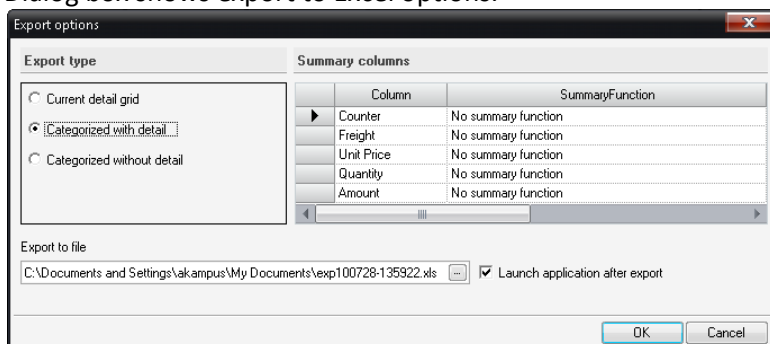
Export to Excel

You can export data from detail grid to an Excel for further processing or distribution. In Excel you will always get the data displayed on a screen. It means export will take into account selected filter, order of columns in a detail grid and other settings. Steps for exporting data to Excel:

- 1 You can export data to Excel by selecting »Export« button  or by selecting menu Reports > Export.



2 Dialog box shows export to Excel options:



3 In section »Export type « you can define different ways to export data.

Export type	Description
Current detail grid	By this export type Excel is populated with detail grid values. First row of Excel is filled with column titles, others rows with grid data.
Categorized with details	By this export type Excel is populated with categories and details inside the categories. In section »Summary columns« you can select summary columns and functions to be exported in Excel. You can choose more columns.
Categorized without details	By this export type Excel is populated with categories without details. In section »Summary columns« you can select summary columns and functions to be exported in Excel. You can choose more columns.

4 In the field »Export to file« the name of exported Excel file is specified. If you want to open Excel after saving select »Launch application after export« option.

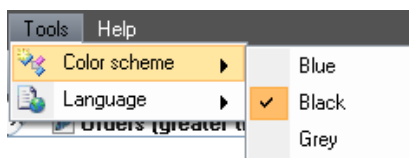
5 Confirm export by selection »OK« button.

Tools

Additional client settings are available through Tools menu.

Setting the color scheme

Client is available in black, blue and gray color scheme. You can change scheme by selecting menu Tools > Color scheme > ...



Setting a language

Client is available in Slovene and English. You can change client language by selecting menu Tools > Language > ... Before changing a language you have to close all opened reports.

